American Cancer Society Volunteer Leadership Model Transition Planning Guide

Introduction
The purpose of this guide is to assist volunteer and staff leaders with the transition to the new volunteer leadership structure of the American Cancer Society. Steps include identifying a volunteer team to lead transition and developing a process for markets within each Region to identify and seat Board members. Additionally, this guide is meant to provide guidance around change management and critical communication practices during the transition period.

This guide covers the following topics:

- Regional Transition Team formation and supporting resources
- Guidance for transition planning
- Change management advice on how to engage others
- Items to consider as you onboard new Market Boards

Regional Transition Teams

The volunteer led transition teams play a critical role in transitioning volunteers from the current Division Board structure to Market Boards and Regional Advisory Cabinets. These teams are charged with identifying the initial members of the new organization, and assuring the continued retention, recruitment, and reengagement of leadership volunteers. This short-term role will be completed in 2017 as the Market Boards become operational.

Regional Transition Team Formation—complete by June 1

- 2017 Division Board chairs are asked to appoint members to the Transition Team and designate one member of the Transition Team as the leader to facilitate the team’s function.
- The recommended size of these teams is five to seven current and/or former leadership volunteers from the Region. Team size may vary based on the needs of the Region. Additional leadership volunteers may be needed to help with transition at a market level and with other transition needs such as communication and change management.
- When selecting members of the Transition Team, consider current Division Board members, former Division Board members, or other volunteer leaders within the Society including attendees of the 2017 ACS Nationwide Volunteer and Staff Leadership Summit. Summit attendees were specifically charged to become a network of change leaders this year.
- An ideal candidate for the Transition Team is an experienced ACS leadership volunteer who is skilled with volunteer recruitment, communication, change management, and/or project management.
- Orientation webinars will be available for all Transition Teams during the month of June. Exact dates are to be determined in partnership with the Regions. Content will be developed centrally to ensure consistent messaging and equal access to all supporting resources and advisors.
- A volunteer member of the Advisory Group on Volunteer Engagement will be appointed to serve on this team.
- Staff partners for each Region will include: VP Community Development, VP Communication, Talent Strategy Org Development, and Volunteer Engagement Director.
# Regional Transition Team Resource list

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<tr>
<th>Region</th>
<th>Division Board Chairs</th>
<th>Transition Team Members</th>
<th>Markets</th>
<th>Advisory Group on Volunteer Engagement Members</th>
<th>Community Development (staff lead)</th>
<th>Communications</th>
<th>Organizational Development</th>
<th>Volunteer Engagement</th>
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| **West**      | Kay Coleman           | Bill Underriner*        | 1. Seattle  
2. Portland  
3. Hawaii & Guam  
4. Greater LA  
5. Orange Co/Inland Empire/San Diego/Las Vegas  
6. Sacramento  
7. San Francisco  
8. San Jose | Bryan Earnest        | Stephanie Christensen   | Eric Beikmann | Ann Moenke | Ruth Hong |
| **North Central** | Kristi DeLaurentis    | William H. Boykin      | 1. Chicago  
2. Detroit  
3. Indianapolis  
4. Nashville  
5. Louisville  
6. Columbus  
7. Cleveland  
8. Cincinnati | Gary Streit              | Megan Roether           | Kate Dietrich | Ann Moenke | Vicki Ballweg |
| **North**     | Mark Kopczynski       | Bill Underriner        | 1. Minneapolis  
2. Milwaukee  
3. Omaha  
4. Denver  
5. Kansas City  
6. St. Louis | Shelley Sproufske     | Marie Daly              | Suzanne Swanson | Ann Moenke | Vicki Ballweg |
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<td>Boston</td>
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*Indicates Board Chair of the former Division falls within this new Region*
Transition Planning

The primary purpose of transition planning is to execute a process to seat members on the new Market Boards. This process will need to be flexible to meet the unique situations of each Region. However, to stay true to the intent of the Board approved recommendations of the Advisory Group on Volunteer Engagement, and to keep a level of consistency across the organization, five essential elements have been identified with target dates for completion. For each essential element of transition, this guide offers some suggestions for implementation.

Essential Elements Include:
- Communication and Engagement Plan
- Market Board Composition Criteria
- Transition Leadership/Teams
- Market Board Selection Process
- Market Board Orientation Sessions

Transition Planning Flow

Essential Elements for Transition

1. **Develop a communication plan to keep all volunteers and staff apprised of progress and results of transition**
   - Tools have been developed for use in communication. These include a presentation deck providing an overview of the new leadership structure, a Case for Change, and an FAQ document. Tools will be refreshed and posted on My Society Source for volunteers and Society Source for staff audiences.
   - Current Division Board members remain important leaders to our transition efforts. It is recommended that you have included a mechanism to keep them informed and engaged in your efforts.

2. **Determine Market Board composition criteria**
   - Individual member role descriptions have been provided which outline skills, competencies, and functional area representation (i.e. mission, revenue). **These should be consistently applied across the Society.**
   - Each Region is encouraged to determine to what degree geographic representation is important for Board membership and provide that guidance to markets for their recruitment. **Critical Question: Is it important that you have people who live throughout the market or is it more important that you get the right people for the job? Or Both?**
   - Identify any existing lists of volunteers who might be candidates for Board membership. **Critical Question: Have you done an assessment of all existing leadership structures (i.e. Volunteer Leadership Councils, Boards of Ambassadors, RFL Committees, ACS Young Professional Groups, etc.)? In addition to current Division Board**
3. **Determine Board transition leadership/teams in the markets**

- Regional Transition Teams are encouraged to identify volunteer leadership to coordinate the details of Market Board selection and onboarding. *Critical Question: Is one individual enough to lead or might you want a small 3-5 person team at the market level to manage the recruitment, selection, and Board orientation tasks?*

- An ideal candidate for this role is an experienced ACS leadership volunteer who is well connected within the market. Consider this as an opportunity to engage additional members of the Division Board as well as attendees from the 2017 ACS Nationwide Volunteer and Staff Leadership Summit.

- Since the Market Board needs to be diverse and include members from different areas within the market, selection of the Transition Team members should have similar considerations.

- Regardless the size of the team doing the work at the market level, make sure one member of the group is clearly designated as the leader to facilitate the team’s function.

- The Executive Director is the key staff resource and partner within the market. However, the intent is that this process is led by volunteers.

4. **Determine Market Board selection process**

- **The selection process should be complete by September 30.**

- Position descriptions are provided for Board members, the Market Board Chair and Vice Chair.

- The Boards are intended to be comprised of 10 to 15 members. For the initial Board to be launched, a minimum of six to eight members should be chosen. It is recommended that several seats be left open, so that the new Board can recruit new members as it identifies needs and has strong candidates emerge.

- An additional consideration for the sustainability of the Board is terms of service. Because three year terms are the standard, it is recommended that half of the new members are given three year terms, and half the initial members are given two year terms to stagger the times that members will depart from the Board.

- It is recommended that a self-application/nomination be completed by all potential members to ensure their interest, availability, and willingness to assume the responsibilities, if selected. In cases where another volunteer or staff person nominates a potential Board member, it is recommended that the nominee is engaged and asked to apply.

- To facilitate this work, a nomination/application form has been created to capture information on candidates, and a list of example candidates is also available. *Critical Question: How wide will you cast your net to solicit candidates? What other volunteers and staff in the market (who know the pipeline more intimately) will you encourage to recommend members? What about volunteer leaders outside of the market who may know of strong candidates to recommend?*

- A broad pool of candidates is needed to support the market. Considerations include (but are not limited to): diversity, relevant skills (e.g. medical, public health, marketing, advocacy, communications, fund raising), geographic coverage within the market, young professionals, and so forth. Members of current structures such as Division Boards and Leadership Councils are also a good source of candidates, as are attendees from
the 2017 Nationwide Volunteer and Staff Leadership Summit, ACS CAN volunteers, and Honorary Life Members. The Transition Team should agree on a deadline for building the candidate pool.

- Once a pool has been developed, the Transition Team needs to select members for the Board. The team should agree on a process they will use to evaluate candidates and select new members. The process should include how to determine the initial length of term as well as a plan for member notification once chosen.  
  **Critical Questions:** Will you recruit a Chair and then recruit members with their leadership or will you select all members and determine a Chair from among them? Will your Board Chair reach out and welcome each member? Will you announce (via media) the selection of your new Board within the market?

- Candidates for the Market Board who are not selected also need to be contacted after the selection process and placement of these candidates in another appropriate volunteer role is important should they be interested. Consideration should be given to maintaining and developing a candidate pool as this will be needed to sustain the Board model long term.

- While nominating/selection processes often avoid having candidates serve on the selection team, in this instance it may be unavoidable. The team will need to discuss how to handle this situation to minimize any awkwardness should members also be candidates.

- The new Market Board Chair will also be a member of the Regional Advisory Cabinet, so it is recommended that the Regional EVP reach out to welcome the new Chair.

### 5. Market Board Orientation Sessions

- **Board Orientation Sessions should be complete by November 15.**

- It is recommended that as soon as a Board is seated, the process to onboard members begins.

- It is within the discretion of each market and region to determine their approach. The only dependency is the availability of enterprise content and resources to delivery.  
  **Critical Questions:** Is there any value in waiting to ‘launch’ all new Boards together? Would you convene via a virtual kick off webinar? What is the cost of a long waiting period between selection and beginning their new role?

- Orientation webinar content will be available for all Boards no later than August 1. Content will be developed centrally and provided to markets. The National Volunteer Training Team will be a ready resource to help deliver these sessions as needed.

- Self-paced learning opportunities for individual members of the Board will be available via the ACS Volunteer Learning Center. Topics covered are identified in the attached Market Board onboarding checklist.

### CHANGE MANAGEMENT

**Engaging with others during this period**

- Engage your current Division Board members individually and collectively to help with the change management process.

- Be open, honest, and understanding. During times of change, emotions and tensions are high because what is familiar is changing and there is a period of unknown. Increasing communication during this period is important to alleviate misconception, rumors, and increase clarity and trust.
• Get the information you need to be successful. Participate in Our Path Forward webinars, listen to the recording, and read the presentations and tools provided. Ask the questions that you need answered.

• When communicating changes, share the purpose as well as the benefit and be sure to ask instead of demand. Take time to completely provide necessary information, contacts, and the “little known facts and information” that will help the person to be successful. Follow up when work is accepted or completed successfully and extend thanks.

• Resources & Tools: There is a lot of great information for volunteers and staff on My Society Source and Society Source respectively. Specific documents include:
  - Case for Change talking points
  - Change Management Toolkit for Volunteers
  - Change Savvy Training (volunteer learning center)

**Onboarding New Market Boards**

A more complete Learning Guide for Market Board Members will be available from our Volunteer Engagement Department in advance of Market Board orientations. Below are some early items to consider as you onboard new Market Boards. Where appropriate ensure they are completing these activities:

- ACS Orientation
- ACS Privacy & Confidentiality Training
- Volunteer Staff Partnership Training Series
- Diversity & Inclusion Training Series
- Market Planning 101
- Market SWOT Analysis: Community Volunteer Structures